

☐ UNCLASSIFIED☐ INTERNAL
USE ONLY☐ CONFIDENTIAL☐ SECRET

ROUTING AND RECORD SHEET

SUBJECT: (Optional)

FROM:

EXTENSION

NO.

Chief, Benefits and Services

Division:

5 E 56, Hq.

DATE

1 NOV 1977

TO: (Officer designation, room number, and building)

DATE

OFFICER'S
INITIALS

COMMENTS (Number each comment to show from whom to whom. Draw a line across column after each comment.)

1 DD/Pers/SP
5 E 56, Hq.

11 NOV 1977

2 EA - D/Pers
5 E 58, Hq.

11 NOV 1977

3 AD/Pers
5 E 58, Hq.

11 NOV 1977

5 C/BSO
5 E 56, Hq.

11/14

6 DC/BSO

15/15

8 C/IB

9

10

11

12

13

14

15

OK Ins, please
no com & new
four key

6 to 8

I'll be
glad to sit in on
the meeting if
you think it
would help.

= avail only thru
29 November.

PERS 77-3542

1 NOV 1977

NOTE FOR: Acting Director of Personnel
SUBJECT : Proposed Prepaid Legal Plan

Ben -

1. Recommend that [] call [] and arrange a meeting with him. [] would also have [] and/or OS representative attend and cover the following points:

STAT
STAT

- a. Secure handling and protection of cover.
- b. Clearance of Plan's attorneys.
- c. Service to be provided and costs.
- d. Enrollment procedure, billing, and other administrative details.

2. If you approve this approach, I will have [] proceed with the meeting and keep you advised of our progress.

STAT

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[]
Chief, Benefits and Services Division

APPROVED:

11 NOV 1977

STAT

Date

Acting Director of Personnel

Distribution:

- 0 - Return to C/BSD
- 1 - AD/Pers
- 1 - [] (w/held)

STAT

FFPS

17-3376

STAT

ATTORNEY AT LAW

October 20, 1977

STAT
SIAI

Deputy Director of Personnel
Central Intelligence Agency
Washington, D. C. 20505

RE: PRE-PAID LEGAL PLAN

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has talked with you about the
Pre-Paid Legal Plan offered by our firm, and, as we
understand, has shown you our schedule of services.

STAT

We are writing at this time to advise that we
are available at your convenience to answer any questions
you may have regarding the plan, and to present our program
to you.

Our plan is far more comprehensive than any other
private plan we know of. In addition, we have experience
in this area, having conducted and serviced such a plan as
long ago as 1974.

Sincerely,

STAT

cc: Mr. Anthony Laphan, Esquire

STAT

15 September 1977

MEMO FOR THE RECORD

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SUBJECT: Prepaid Group Legal Service

1. [] and I met with [] of OGC today to discuss his memorandum on this subject. He had been given a copy of a group plan now held by the police and fire services of Arlington, Alexandria and Fairfax counties. It was his suggestion that a working group be convened to discuss the appropriateness of the concept and to identify problem areas. STAT

2. [] explained that the Office of Personnel had first looked at this matter in 1972 and that we have been following the progress of such plans since that time. In February 1977 we were contacted by representatives of the American Business Association, Inc. and shortly after that [] referred literature to us on a plan offered by the Fortemere Association, Inc. We asked OGC for advice concerning the concept and these particular plans. The 5 April 1977 response was prepared by [] and indicated that the "state-of-the-art" regarding prepaid legal services is in its infancy. [] commented that in concept such plans appear worthwhile but that he was not in a position to provide a recommendation on either plan. With the obvious security and cover problems involved and an absence of support from OGC, we did not see the climate right for initiating such a program and decided in June 1977 to defer further consideration. The DDA was advised of this on 17 June 1977 in response to the referral by an employee of a news article on the subject. STAT

3. In the past, GEHA has provided insurance plans for our employees that they could not purchase for themselves either because of security and cover restrictions or because group rates were not otherwise available. It is not clear as yet whether this will be the case with prepaid legal. The League of Federal Recreation Associations is offering the American Business Association plan to its members and all of our overt employees could be easily enrolled with this group. There would remain a need to offer some plan to our covert employees unless group participation proves to be of no advantage.

4. [redacted] indicated that we plan to let the matter rest for awhile. When we are prepared to move we will probably refer to EAG to determine an Agency position. If EAG is in favor, we may conduct an employee survey to determine the level of interest. The next step would be to ask for bids. All agreed that we must avoid any favoritism toward former employees in the selection of a legal service. Until such time as action is taken, questions should be referred to OP.

STAT

[redacted]
Chief, Benefits and Services Division

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